Prospects for Foreign Trade in

FRUITS, VEGETABLES, TREE NUTS

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CONTENTS

PROSPECTS FOR FOREIGN TRADE IN FRUITS, VEGETABLES, AND TREE NUTS

SUMMARY

For the 1961-62 marketing season, U. S. production of all kinds of fruit is larger than that of last year. The deciduous fruit crop is about 10 percent higher than the 1960 crop, and export availabilities are larger than last season except for dried prunes. The citrus fruit crops are larger than in 1960-61, although supplies of summer oranges will be short in the summer of 1962. The tree nut crops also are large this season. In Western Europe, deciduous fruit crops are smaller than in 1960-61. Foreign competitive supplies of canned deciduous fruits are about the same and those of citrus fruits are slightly higher than last season, while competing supplies of dried fruits and tree nuts are considerably heavier.

Demand conditions in Western Europe continue excellent. Progress in liberalization of European import barriers to trade in canned deciduous fruit was significant, although import barriers remain in the citrus and fresh deciduous fruit fields. The increase in U.S. export availabilities will mean increased U.S. fruit exports in 1961-62 over those of last season.

Mediterranean orange production in 1961-62 will be slightly heavier than last year. This year's winter lemon crop in Italy promises to be heavy, although the summer crop is expected to be small. Exports of processed citrus products and of fresh grapefruit and lemons from the United States are expected to increase during the forthcoming season. Exports of fresh U.S. summer oranges probably will be reduced in view of the short crop of California Valencia oranges in prospect.

Western European crops of apples and pears this season are relatively short, while the U.S. crops are larger than last year. Most Western European countries are permitting imports of these fruits from North America earlier this season than last. Thus, both economic conditions and less stringent quantitative restrictions indicate increased offshore exports of U.S. fresh apples and pears in 1961-62 over those of last season.

World production and trade of canned deciduous fruits are expected to be at record levels in 1961-62. U.S. canned fruit supplies and export availabilities are large this season. Liberalization of imports of canned deciduous fruits by the United Kingdom and West Germany will increase opportunities for U.S. exporters this season.

Both the United States and world supplies of raisins are large this season, with prices at keenly competitive levels. The U.S. dried prune and dried apricot crops are below average, while competitive production is up sharply compared with last year.

World supplies of almonds are at record levels this season, while world crops of walnuts are above and filberts below average. The European market for tree nuts has been exceptionally favorable this season, so that imports of tree nuts into the United States are not expected to be burdensome this marketing season, and U.S. almond exports may equal the 1960-61 volume.

Prospects for exports of both fresh and processed vegetables, both to Canada and to Western Europe, appear favorable for the 1961-62 marketing season. The important Canadian market receives the bulk of the U.S. shipments, and total exports there should continue to increase if there is no damage to the U.S. winter vegetable crop. Small although increasing shipments of fresh and processed vegetables are, however, being made to Western Europe. Despite a large U.S. potato crop, exports are expected to be down this season. No exports to Cuba are expected, and trade with Canada may be small because of the large Canadian crop and the restrictive measures adopted by the Canadian Government.

Significant progress was made in 1961 toward removal of European barriers to trade in canned deciduous fruits. The United Kingdom liberalized imports of canned deciduous fruits except apples, and West Germany liberalized imports of canned peaches and fruit cocktail. The United States is

still endeavoring to persuade the United Kingdom it should remove the discriminatory barriers remaining on its imports of fresh winter grapefruit and of processed orange and grapefruit products from the United States. Also continuing are special efforts to persuade Western European Governments to admit fresh apples and pears from the United States on a basis comparable with that for imports from competing Northern Hemisphere suppliers.

The application of the United Kingdom for membership in the European Economic Community is of great interest to exporters of U.S. horticultural items. The United Kingdom is an extremely important offshore market for these items. Its duties are significantly lower than the proposed Common Market external tariff for most horticultural products. So there is a danger that the U.K. import duties will be increased significantly in any customs merger with the EEC countries. This problem is extremely important also to many competing fruit producers in the Commonwealth who at the present time enjoy preferential treatment in the U.K. market.

Developments continue to take place in the EEC countries that will affect trade in horticultural items. Although the negotiations concerning the EEC external tariff structure were not completed by November 1961, the member countries are gradually advancing their individual tariff structures toward the levels proposed as the common external tariffs and gradually reducing their tariffs on imports from other member countries. At the same time, standards of packaging and quality are continuing to be developed, which will govern horticultural trade within the EEC.

The establishment of food health regulations relating to the use of chemicals on fruit and vegetable items is continuing in many Western European countries. The European Economic Community is initiating an endeavor to "harmonize" the food health regulations of the individual countries in the EEC.

As nontariff barriers to trade have been reduced, increasing emphasis is being placed by U.S. fruit exporting industries upon market development programs. Several programs have been placed on a continuing basis during this past year. In addition, some horticultural industries which have not heretofore participated to any significant extent in the European market have initiated programs in an endeavor to create market opportunities abroad.

PROSPECTS BY COMMODITY GROUPS

Citrus Fruit

Fresh Citrus.--Crop reports indicate that Mediterranean citrus supplies will be slightly heavier than during the 1960-61 season, although not as large as during the 1959-60 season. The 1961-62 Italian winter lemon crop promises to be heavy, although the Italian Verdelli lemon crop is expected to be small in the summer of 1962.

Grecian women sort and load tangerines for shipment to market. The Mediterranean area is Europe's chief supplier of citrus.

The composition of U.S. citrus supplies during the 1961-62 season will again affect availabilities of fruit for export. U.S. supplies of winter oranges and of grapefruit and lemons are relatively abundant, while the California Valencia crop is expected to be relatively small in the summer of 1962.

The Canadian market is by far the most important outlet for exports of fresh oranges and grapefruit from the United States and prospects continue favorable. About two-thirds of the total U.S. exports of fresh oranges and of fresh grapefruit go to the Canadian market. Less than one-fifth of the U.S. exports of fresh lemons, on the other hand, is shipped to the Canadian market.

Since incomes in the Western European countries continue favorable, and the 1961-62 European apple and pear crops are relatively short, relatively favorable marketing conditions appear likely in Western European markets for fresh citrus fruits, especially oranges and grapefruit.

Exports of fresh citrus from the United States to Western European markets, however, continue to be hampered by food health regulations established in several Western European countries. Many of them have banned the imports of fresh oranges colored with Citrus Red No. 2. The Foreign Agricultural Service is carrying out experiments in the United Kingdom to supplement the tests which served as a basis for the approval of Citrus Red No. 2 in the United States. Also, West Germany has adopted labeling regulations which discourage consumer purchases of fruits treated with post-harvest chemicals. These tend to benefit the acceptance of fruit from nearby Mediterranean countries at the expense of fruit from more distant areas which is treated with chemicals to preserve the keeping quality during the longer transit.

TABLE 1.--Citrus fruits: Production in principal producing areas, 1953-61

Commodity and crop year	United States	Mediterranean	Southern Hemisphere	Other	World total
Oranges and tangerines:	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*
1953	131	104	42	35	312
1954	136	111	44	44	335
1955	137	114	46	43	340
1956	137	92	52	49	330
1957	111	122	55	52	340
1958	134	131	61	55	381
1959	130	142	62	56	390
1960	122	132	66	57	377
1961	131	158	---	---	---
Grapefruit:					
1953	48	2	1	2	53
1954	42	2	1	2	47
1955	45	2	1	2	50
1956	45	2	1	2	50
1957	40	2	2	2	46
1958	44	3	2	1	50
1959	42	2	2	2	48
1960	43	3	2	2	50
1961	47	3	---	---	---
Lemons:					
1953	16	14	3	---	33
1954	14	14	4	---	32
1955	13	14	4	---	31
1956	16	15	4	---	35
1957	17	17	4	---	38
1958	17	19	5	---	41
1959	18	18	5	---	41
1960	14	17	5	---	36
1961	17	20	---	---	---

For the most part, Western European markets have removed quantitative restrictions on imports of fresh citrus fruit from the United States. The United Kingdom, however, continues to prohibit imports of fresh grapefruit from the dollar area from October through February as a means of protecting the British market for British West Indies suppliers. Negotiations, which thus far have not succeeded in the removal of this restriction, are continuing with the U.K. Government.

In view of the relatively small supplies of California oranges in prospect and the continuing barriers in many Western European countries on import of oranges colored with Citrus Red No. 2, exports of U.S. fresh oranges to Western European markets are expected to be smaller than the 1.4 million boxes shipped last year. U.S. fresh orange exports to Western European markets have gradually been decreasing over the past several years, largely as a result of decreasing availabilities of the seasonal supplies traditionally exported to European markets.

U.S. fresh lemon exports to Western European markets, on the other hand, have increased gradually over the past several years, and this trend should continue. Exports of U.S. fresh grapefruit to Western European markets exceeded 800,000 boxes during the 1960-61 season and were the

TABLE 2.--Fresh citrus fruit: U.S. share of world production and trade, and percent of U.S. sales exported, by principal destination, 1953-60

Crop year	U.S. share of world--		Percent of U.S. sales exported			
	Production	Trade	Total	Europe	Canada	Other
	Percent	*Percent*	*Percent*	*Percent*	*Percent*	*Percent*
1953..............	50	16	12.3	4.1	7.5	0.7
1954..............	47	17	12.7	4.7	7.1	.9
1955..............	47	20	15.0	6.8	7.2	1.0
1956..............	48	19	14.9	6.6	7.3	1.0
1957..............	40	13	13.8	5.8	7.2	.8
1958..............	41	13	13.3	4.5	7.5	1.3
1959..............	40	11	12.5	3.7	7.2	1.6
1960..............	39	12	13.4	5.5	7.0	.9

TABLE 3.--Fresh citrus fruit: Exports to Europe from principal supplier, crop seasons 1955-60

Commodity and origin	1955	1956	1957	1958	1959	1960
Oranges and tangerines:	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*
United States............	4.3	3.8	1.2	1.7	0.8	1.4
Mediterranean area.......	49.3	42.5	54.7	55.3	64.3	60.7
Southern Hemisphere......	6.3	7.5	8.7	8.4	9.6	12.3
Grapefruit:						
United States............	.6	.6	.5	.6	.5	.8
Mediterranean area[1]......	1.7	1.8	1.7	2.0	2.3	2.5
Southern Hemisphere......	.4	.5	.5	.6	.6	.7
Lemons:						
United States............	1.3	1.5	2.6	1.4	1.8	2.0
Mediterranean area.......	6.5	7.9	6.4	9.6	9.4	8.6
Southern Hemisphere......	1.9	1.2	1.7	1.5	2.4	2.1

[1]Includes small quantities from the Caribbean.

largest in recent years. It seems likely that U.S. grapefruit exporters will ship even larger quantities to Western European countries during the 1961-62 marketing season.

Processed Citrus.--As it is for fresh oranges and grapefruit, the Canadian market is an extremely important export outlet for many of the processed citrus items shipped from the United States. Most U.S. exports of orange juice and grapefruit juice, both frozen concentrated and single-strength, are shipped to Canada. Most of the exports of hot pack concentrated orange and grapefruit juice and of canned grapefruit segments, on the other hand, are shipped to Western European markets. Exports of lemon juice from the United States also are shipped mostly to Western European countries.

The Western European market for processed citrus juices has been increasing in much the same fashion as did the U.S. market several years ago. Although U.S. processed citrus products have participated in this market, exports of U.S. orange and grapefruit products in recent years have been comparatively small because the reduction of supplies through adverse weather conditions, particularly in the Gulf Coast area, has resulted in relatively favorable price levels at home. The 1961-62 U.S. Gulf Coast citrus supplies are expected to provide increased availabilities for export, however, and U.S. exports of processed orange and grapefruit products should increase over the levels of recent years.

The participation of U.S. orange and grapefruit products in the United Kingdom market, like that of fresh grapefruit, is limited by relatively small quotas imposed on imports of these products from the dollar area.

Deciduous Fruit

Fresh Fruit.--Canada continues to provide the most important outlet for all U.S. fresh deciduous fruit shipments. Nearly 60 percent of the total tonnage of all fresh deciduous fruits exported is shipped to Canada.

TABLE 4.--Table apples and pears: Production in principal producing areas, 1953-61

Commodity and crop year	United States	Foreign countries					World total
		Western Europe		Other Northern Hemisphere	Southern Hemisphere	Total	
		Market Countries[1]	Other				
Apples:	*Mil. bu.*	*Mil. bu.*	*Mil. bu.*	*Mil. bu.*	*Mil. bu.*	*Mil. bu.*	*Mil. bu.*
1953	95	162	65	43	27	297	392
1954	112	197	65	46	32	340	452
1955	107	126	84	46	29	285	392
1956	101	198	94	60	35	387	488
1957	118	79	71	63	33	246	364
1958	127	263	115	67	40	485	612
1959	127	142	118	68	40	368	495
1960	108	267	117	72	39	495	603
1961	125	142	133	---	---	---	---
Pears:							
1953	28	60	28	12	8	108	136
1954	30	55	23	12	11	101	131
1955	30	56	27	12	10	105	135
1956	32	46	28	15	11	100	132
1957	32	21	26	14	12	73	105
1958	29	78	33	16	11	138	167
1959	30	41	36	17	12	106	136
1960	26	72	37	19	11	139	165
1961	26	51	44	---	---	---	---

[1]Austria, Belgium, France, Germany, Ireland, Netherlands, Norway, Sweden, Switzerland, and United Kingdom.

TABLE 5.--Fresh deciduous fruit: U.S. share of world production and trade, and percent of U.S. sales exported, by principal destination, 1953-60

Crop year	U.S. share of world--		Percent of U.S. sales exported			
	Production	Trade	To Europe	To Canada	To other countries	Total
	Percent	*Percent*	*Percent*	*Percent*	*Percent*	*Percent*
1953	26	9	0.3	2.2	1.2	3.7
1954	27	10	.5	2.6	1.1	4.2
1955	27	9	.9	2.9	1.3	5.1
1956	26	10	.7	3.4	1.1	5.2
1957	31	15	3.1	3.2	1.2	7.5
1958	23	10	.9	3.0	1.2	5.1
1959	26	10	2.0	3.7	1.3	7.0
1960	21	11	1.3	4.2	1.2	6.7

TABLE 6.--Fresh apples and pears: Exports to Western Europe, by major supplying area, average 1949-53, annual 1955-60[1]

Commodity and origin	Average 1949-53	1955	1956	1957	1958	1959	1960
	Mil. boxes	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*	*Mil. boxes*
Apples:							
United States	0.9	0.8	0.4	3.3	0.7	1.9	1.1
Canada	1.1	.9	.6	1.8	1.0	1.3	1.1
Europe	13.0	23.9	21.6	22.9	19.4	39.4	18.9
Southern Hemisphere	4.1	7.9	8.2	10.7	10.9	11.2	11.6
Pears:							
United States	.1	.3	.4	.9	.3	.8	.3
Europe	4.6	5.8	5.2	3.6	5.6	7.3	6.8
Southern Hemisphere	1.5	2.4	2.9	3.3	2.8	3.2	2.4

[1]Year beginning July 1.

Offshore market potentials for fresh apples and pears--the most important commodities in deciduous fruit trade--are materially better for the 1961-62 season than last year. Adverse weather conditions reduced production of these fruits in European importing countries so that domestic supplies could not satisfy demand and prices opened at high levels. At the same time, U.S. supplies of apples this season are 15 percent larger than last season, and those of winter pears 4 percent larger.

TABLE 7.--Table grapes: U.S. share of world production[1] and trade, and percent of U.S. sales exported, by principal destination, 1953-60

Crop year	U.S. share of world--		Percent of U.S. sales exported			
	Production	Trade	To Europe	To Canada	To other countries	Total
	Percent	*Percent*	*Percent*	*Percent*	*Percent*	*Percent*
1953.............	19	18	---	7.1	2.3	9.4
1954.............	17	18	.1	8.0	2.5	10.6
1955.............	18	20	.6	8.8	2.8	12.2
1956.............	16	19	.9	9.9	2.6	13.4
1957.............	17	22	.9	11.1	2.9	14.9
1958.............	14	18	.9	11.7	3.0	15.6
1959.............	15	20	1.0	13.2	2.8	17.0
1960.............	15	21	1.3	13.7	2.8	17.8

[1]Grapes consumed fresh.

Many Parisiennes buy fruit for their families at street markets in the old sociable way; but the growth of U.S.-type supermarkets is changing their shopping and gossiping habits.

Below, U.S. horticultural items are loaded aboard ship for transit to Europe, the best offshore market U.S. growers have for them.

Production of dessert and cooking fruit this season in principal European countries is down about 29 percent from 1960 for apples and 11 percent for pears, by first official estimates. Most of this decrease occurred in the importing countries, with exporting countries at or close to last year's level.

European countries which maintain seasonal embargoes on apples and pears opened their borders earlier this season, allowing the United States to compete for business in their markets over a much longer period. Also openings were early enough to permit sales in some of these countries for Christmas, a peak business period from which the United States has been excluded in most years.

With markets opening in November and December, the United States is afforded entry at a time when competition is not as great

as it is in later months when the Southern Hemisphere is shipping to European markets. U.S. exports of apples and pears this season to Europe will increase significantly from the 1.2 million and 400,000 boxes, respectively, shipped during the 1960-61 season.

U.S. exports of fresh table grapes in 1960-61, totaling 97,000 tons, continued the gradual upward trend which has prevailed in recent years. Trade again increased somewhat to Canada and significantly to Western Europe. Sales to this latter market have now reached a volume approaching the pre-World War II average of about 8,000 tons.

Canada, as usual, purchased the bulk of U.S. grape exports--77 percent of the total--and Venezuela was again the second most important foreign market. The United Kingdom continued as third in order of importance, taking over 3,000 tons.

Canned Fruit.--Supplies of canned deciduous fruit during 1961-62 in the major producing countries will be the heaviest on record. International trade in deciduous canned fruit in 1961-62 will probably exceed the previous season's record level.

TABLE 8.--Canned deciduous fruit: Production, by area, 1954-60 seasons

Area	1954	1955	1956	1957	1958	1959	1960
	Mil. cases[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]
United States	57.7	65.8	71.1	65.2	64.1	77.6	76.6
Canada	3.3	3.8	2.8	3.3	3.1	2.9	3.0
Europe	9.3	9.1	11.8	9.4	12.0	12.5	12.1
Australia and South Africa	7.5	7.7	7.5	9.8	7.8	9.5	9.5
Other Countries	1.5	1.8	2.7	4.5	3.9	3.9	4.2
Total	79.3	88.2	95.9	92.2	90.9	106.4	105.4

[1]Equivalent 24 No. 2-½ cans.

TABLE 9.--Canned deciduous fruit: U.S. share of world production and trade, and percent of U.S. sales exported, by principal destination, 1953-60

Crop year	U.S. share of world--		Percent of U.S. sales exported			
	Production	Trade	To Europe	To Canada	To other countries	Total
	Percent	*Percent*	*Percent*	*Percent*	*Percent*	*Percent*
1953	80	25	1.6	1.3	1.1	4.0
1954	73	24	1.5	1.7	1.1	4.3
1955	75	29	3.0	1.3	1.2	5.5
1956	74	33	3.5	1.8	1.3	6.6
1957	71	33	4.6	2.1	1.3	8.0
1958	71	30	3.8	1.6	1.1	6.5
1959	73	36	5.0	1.8	.9	7.7
1960	73	41	6.3	2.2	.7	9.2

TABLE 10.--Canned pineapple: Production, by area, 1954-60

Area	1954	1955	1956	1957	1958	1959	1960
	Mil. cases[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]
Hawaii[2]	13.1	14.7	14.6	13.5	14.2	14.2	15.0
Malaya	1.3	1.4	1.7	2.1	1.9	1.6	1.8
Others	3.9	4.2	4.8	5.4	6.6	6.0	5.7
Total	18.3	20.3	21.1	21.0	22.7	21.8	22.5

[1]Equivalent 24 No. 2½ cans. [2]Includes Philippines.

TABLE 11.--Canned fruit: Imports, by area, 1955-60

Commodity and area	1955	1956	1957	1958	1959	1960
	Mil. cases[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]	*Mil. cases*[1]
Deciduous:						
Europe	8.7	9.7	11.5	12.6	14.2	14.9
Canada	1.0	1.6	1.6	1.3	1.8	1.7
U.S.	.1	.1	.1	.1	.1	---
Other	.2	.3	.2	.2	.3	.1
Total	10.0	11.7	13.4	14.2	16.4	16.7
Pineapple						
Europe	4.7	5.2	6.4	6.4	7.2	6.7
Canada	.7	.7	.9	1.0	1.0	.9
Other	.2	.4	.3	.6	.9	.8
Total	5.6	6.3	7.6	8.0	9.1	8.4
Total:						
Europe	13.4	14.9	17.9	19.0	21.4	21.6
Canada	1.7	2.3	2.5	2.3	2.8	2.6
U.S.	.1	.1	.1	.1	.1	---
Other	.4	.7	.5	.8	1.2	.9
Total	15.6	18.0	21.0	23.2	25.5	25.1

[1]Equivalent 24 No. 2½ cans.

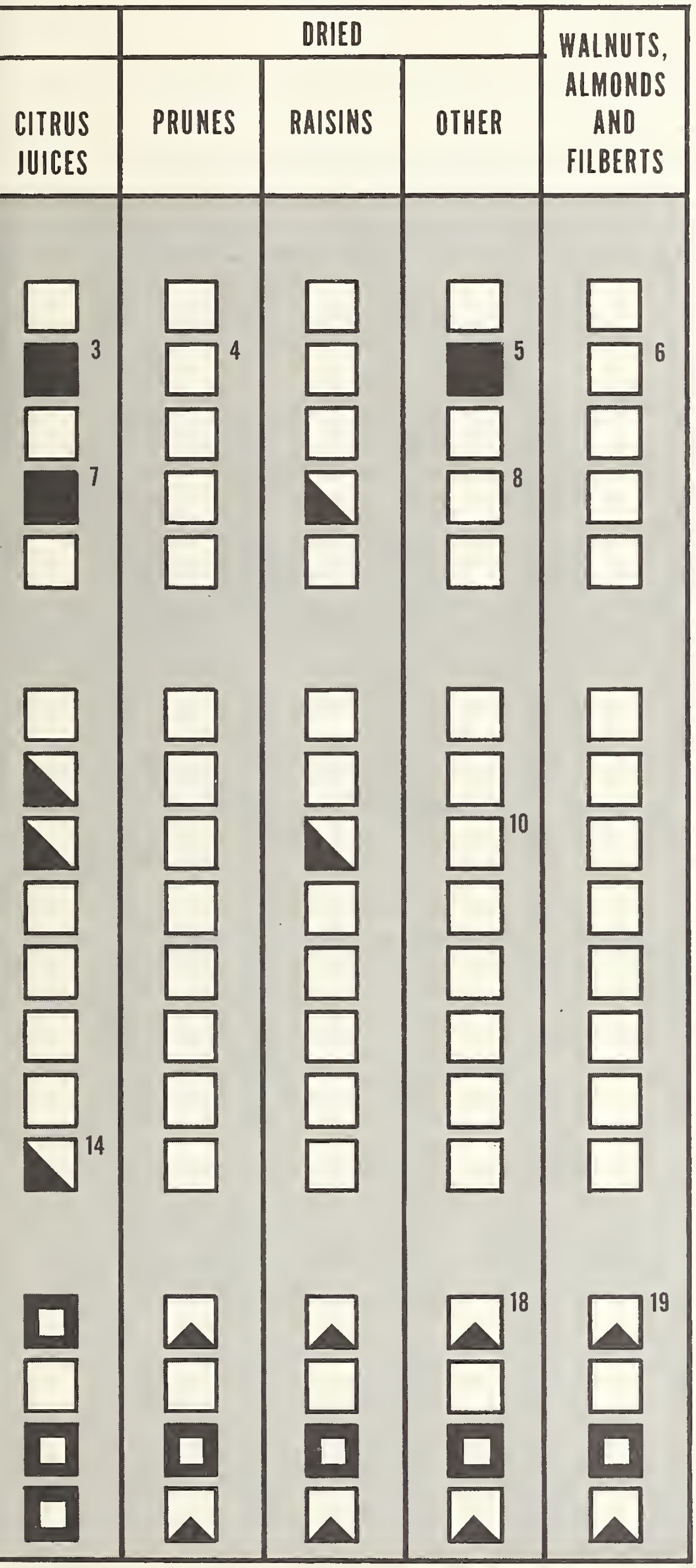
The 1961 U.S. pack promises to be the largest ever produced. Clingstone and Freestone peaches, fruit cocktail, and cherries are among the items showing increases over 1960; the apricot pack has declined and the pear pack remained about the same as in 1960. The U.S. canners' carry in is also record-large. On June 1, 1961, the carry-in of apricots, Clingstone peaches, fruit cocktail, and pears was, for each item, materially larger than that of June 1, 1960.

Foreign production is believed to be of a volume similar to that of 1960. The Australian and South African packs processed in early 1961 totaled about the same as in 1960. Their combined

IMPORT CONTROLS OF FOREIGN COUNTRIES

AREA AND COUNTRY	FRESH			CANNED			
	APPLES AND PEARS	GRAPES	CITRUS	PEACHES AND COCKTAIL	PINEAPPLE	PEARS AND APPLES	GRAPEFRUIT SECTIONS
Common Market							
Belgium-Lux.	◪	■	□	□	□	□	□
France	▣	■	□ [2]	■	■	■	■
Germany, F.R.	▽	□	□	□	□	▽	□
Italy	□	■	□	□	□	□	□
Netherlands	□	■	□	□	□	□	□
Other Europe							
Austria	▣	■	□	□	□	□	□
Denmark	▣	▣	□	□ [9]	□	■	□
Finland	⬕	⬕	⬕	⬕	⬕	⬕	⬕
Ireland	◪ [11]	□	□	□	□	□	□
Norway	◪	□	□	□	□	■	□
Sweden	◪	□	□	□	□	□	□
Switzerland	▽	□	□	□	□	□	□
United Kingdom	⬕	□	□ [12]	□	□	□ [13]	⬕
Other Countries							
Japan	■ [15]	■	⬕ [16]	⬕	■	⬕ [17]	▲
Malaya-Hong Kong	□	□	□	□	□	□	□
Mexico	▣	▣	▣	▣	▣	▣	▣
Venezuela [20]	▲	▲	■	▣	▣	▣	▣

FOR COMMODITIES FROM THE DOLLAR AREA [1]



1. Figures and numbers in the table represent the following controls:
   - No import controls
   - Imports subject to automatic licensing
   - Imports limited by volume
   - Imports limited by time periods
   - Imports limited by irregular or arbitrary controls
   - Imports prohibited
2. Oranges from October 21 to June 14
3. Lemon and grapefruit juice
4. Natural condition prunes in sacks only
5. Apricots and figs (in 15kg. cases)
6. Walnuts
7. Grapefruit juice
8. Excludes consumer packed dates and figs
9. Fruit cocktail and salad
10. Dates and figs
11. Pears
12. Grapefruit from October 1 to March 30
13. Apples
14. Lemons
15. Pears
16. Lemons
17. Apples
18. Dates
19. Walnuts
20. Exchange control restrictions

apricot pack was smaller, as was the fruit cocktail pack, while Cling peach output was virtually unchanged and that of pears sharply increased. The Argentine pack, mostly Cling peaches, was reported as materially larger than that produced in early 1960. The 1961 Spanish apricot and Italian pear packs are reported to be smaller than a year ago.

The prospects are favorable for further increases in U.S. exports of canned peaches and cocktail during the 1961-62 season, even though U.S. exports of these items set new records in 1960-61. (U.S. exports of peaches in 1960-61 totaled 4.1 million cases--more than 150 percent above the prewar level; fruit cocktail exports amounted to 2.1 million cases--also more than 150 percent above prewar.) U.S. 1961-62 exports of these items are expected to continue to expand, for these reasons: (1) U.S. supplies are abundant and U.S. prices are more competitive than ever; (2) foreign demand continues to grow while competing supplies apparently show no increase for 1961-62; and (3) the United Kingdom and Western Germany, major canned fruit markets, have liberalized imports of the principal canned fruits. Beginning July 1, 1961, peaches and fruit cocktail were permitted importation into Germany free of quotas, and from August 1, 1961, all canned deciduous fruits, except apples, were allowed to enter the United Kingdom free of quantitative restriction.

U.S. canned apricot exports in 1961-62 may also benefit from sharply lower California prices and tighter competitive supplies. Though U.S. apricot exports have risen each of the past two seasons, they remain far below the prewar level principally because of their displacement from the all-important United Kingdom market by Commonwealth canned apricots.

Dried Fruit.--The 1961-62 raisin season will be one of large world supplies and keenly competitive prices. Good raisin crops were harvested in all of the main producing countries in 1961. The carry-in of old-crop raisins, though smaller than a year earlier, was about average. The large 1961 world output of 552,000 tons contrasts strongly with the short 1960 production of 436,000

TABLE 12.--Raisins and dried prunes: Production, by area, in 1953-61

Commodity and crop year	United States	Mediterranean	Southern Hemisphere	World Total
Raisins:	*1,000 tons*	*1,000 tons*	*1,000 tons*	*1,000 tons*
1953	233	208	101	542
1954	168	193	96	457
1955	225	180	85	490
1956	200	253	57	510
1957	163	222	82	467
1958	186	207	94	487
1959	223	263	90	576
1960	194	169	73	436
1961	230	242	82	554
Dried Prunes:				
1953	148	60	16	224
1954	178	17	12	207
1955	135	36	18	189
1956	196	8	18	222
1957	168	28	16	212
1958	97	27	20	144
1959	144	57	18	219
1960	139	8	18	165
1961	138	48	20	206

TABLE 13.--Dried fruit:[1] U.S. share of world production and trade, and percent of U.S. sales exported, by principal destination, 1953-60

Crop year	U.S. share of world--		Percent of U.S. sales exported			
	Production	Trade	To Europe	To Canada	To other countries	Total
	Percent	*Percent*	*Percent*	*Percent*	*Percent*	*Percent*
1953.............	45	24	18.7	4.3	3.0	26.0
1954.............	46	19	14.5	4.8	3.4	22.7
1955.............	48	28	23.1	4.2	3.6	30.9
1956.............	47	26	21.7	4.4	3.2	29.3
1957.............	43	22	21.4	4.9	3.3	29.6
1958.............	39	13	12.9	3.8	2.8	19.5
1959.............	41	18	15.2	3.7	2.9	21.8
1960.............	47	25	18.8	4.0	6.3	29.1

[1]Apples, apricots, peaches, pears, prunes, and raisins.

tons. The volume of raisins moving in world trade during 1961-62 will probably be above average and considerably greater than the reduced export volume of 1960-61.

The 1961 California pack is the largest since 1953; and beginning stocks, too, were above the average of recent years.

In view of the substantially larger packs this year than last in Greece, Iran, and Turkey, and the considerable reduction of prices in those countries as well as in Australia, California raisins will encounter much stiffer competition in 1961-62 than in 1960-61. Although California may succeed in exporting as much as in 1960-61, when an above-average volume of 61,000 tons was shipped, it appears that 1961-62 export prices will be materially lower than the exceptionally good prices received last season.

World dried prune production this year, estimated at 199,000 tons, is 24,000 tons more than the below-average 1960 pack and 4,000 tons above average. International trade, which was down sharply in 1960-61 is expected to rebound in 1961-62, though it might not attain the heavy 1959-60 export volume of 75,000 tons. Prices of foreign dried prunes are also expected to be lower than in 1960-61.

The California dried prune pack of 138,000 tons represents the fourth consecutive year of below-average production--caused each year by unfavorable weather. New-crop prices are somewhat lower than the relatively high levels of the preceding season. The tonnage available for export may be slightly larger than last season because of a somewhat larger carry-in.

The most striking aspect of the foreign picture is that 1961 is the "on year" for Yugoslav production, which may amount to 38,000 tons compared with 3,100 tons in 1960 and 45,000 tons in 1959. Since only a small tonnage is required for Yugoslav consumption, 35,000 tons of Yugoslav prunes may be available for export in 1961-62. Yugoslav exports totaled 14,200 tons (largely 1959-crop fruit) in 1960-61 and 25,200 tons in 1959-60. Relatively large crops were also harvested last spring by Argentina, Australia, and Chile. The 1961 crop in France, a net importer, was also up.

Although California's export availability for 1961-62 is fully as large as for last season, it will probably be more difficult to maintain both 1960-61 prices and export volume, though 1960-61 exports of 37,000 tons were below average.

World production of dried apricots is larger than in 1960 but still less than average. California production, however, is the smallest on record except for 1958. California prices are a little

higher while competitive prices are lower than during the 1960-61 season. The all-important Iranian crop is large this year in contrast to the near failure of the crop last year. As a result, Iranian export availabilities are large and prices again low. The United States had the best export season in 3 years with exports of 1,767 tons in 1960-61. However, it appears doubtful that U.S. exports will be as large as in 1961-62.

Tree Nuts

The 1961 world almond crop is the largest ever harvested. The new crop, estimated at 159,000 tons, shelled, is more than double the 1960 production of 78,000 tons and almost double the average. September 1 stocks in the producing countries, though well below the level of a year earlier, were still above average. World trade in almonds during 1961-62 may well reach record proportions in view of the abundant supply, reduced prices, and continuing expansion of demand. This would be in marked contrast to 1960-61, when world exports were a little above average but 31 percent below the 1959-60 level.

TABLE 14.--Almonds, filberts, and walnuts: Production in the United States and Mediterranean countries, on a shelled basis, 1953-61

Commodity and crop year	United States	Mediterranean[1]	Total
Almonds:	*1,000 tons*	*1,000 tons*	*1,000 tons*
1953	19.6	84.9	104.5
1954	22.2	72.7	94.9
1955	19.2	45.7	64.9
1956	30.0	40.2	70.2
1957	18.0	102.8	120.8
1958	9.6	56.7	66.3
1959	42.2	102.0	144.2
1960	26.8	51.2	78.0
1961	35.0	124.2	159.2
Filberts:			
1953	2.0	50.0	52.0
1954	3.4	74.8	78.2
1955	3.1	53.6	56.7
1956	1.2	87.3	88.5
1957	5.0	65.0	70.0
1958	3.0	73.4	76.4
1959	4.0	78.9	82.9
1960	3.6	59.5	63.1
1961	4.3	71.7	76.0
Walnuts:			
1953	23.1	27.9	51.0
1954	29.4	29.3	58.7
1955	30.2	37.8	68.0
1956	28.0	34.5	62.5
1957	26.0	20.2	46.2
1958	34.6	34.0	68.6
1959	24.4	27.4	51.8
1960	28.4	34.0	62.4
1961	29.6	31.3	60.9

[1] Almonds: Iran, Italy, Morocco, Portugal and Spain. Filberts: Italy, Spain, and Turkey. Walnuts: France, Italy, Iran, Turkey, and Yugoslavia; India also included in Mediterranean total.

The U.S. crop is very large, 77 percent above the 5-year average and substantially greater than the 1960 crop. Old-crop stocks are somewhat above average. Opening 1961-62 California prices are lower than a year earlier.

The increased foreign production is almost entirely attributable to extremely large harvests in Italy and Spain. Old-crop stocks in foreign producing countries on September 1, 1961, were also above average though not as large as on September 1, 1960. Early-season foreign prices for kernels are down about a dime a pound compared with a year earlier. Exports by the foreign producers are expected to be record-large, topping the above-average 1960-61 volume by possibly more than 50 percent. In view of strong domestic demand and strong foreign competition, California exports will probably not attain the export record of 9,400 tons set in 1959-60 but may approximate the 1960-61 export volume of 5,700 tons. Imports into the United States are expected to be of minor importance again this year.

World walnut production in 1961 may total 155,000 tons, unshelled. This is slightly above average but a little below the 1960 production. Reliable foreign production estimates, however, are not available until later in the season and there is some indication that later estimates may be lower. World exports will probably be down and prices up, compared with last season.

The U.S. crop, at 76,100 tons, is 3,000 tons larger than the 1960 crop and near average. With the U.S. pecan crop record-large, there has been some reduction in U.S. walnut prices from the 1960 levels.

Foreign production is fully 10,000 tons below 1960 output. The largest foreign commercial producers, France and Italy, have smaller crops than in 1960, as does India. However, the Turkish and Yugoslav crops are up. Foreign prices are mixed; compared with last winter's prices, opening 1961-crop prices are higher for French walnut kernels but lower for Indian and Turkish kernels. In-shell Italian prices are up. World exports of walnuts in 1961-62 are expected to decline at least 8,000 tons from the 1960-61 level of 59,500 tons, unshelled basis, but would be above the 1959-60 volume when only 42,500 tons were exported in consequence of short crops. U.S. imports of kernels in 1961-62 are expected to be smaller than the exceptionally heavy volume imported during 1960-61. U.S. exports will continue to be minor.

Filbert production in 1961 in the countries of commercial significance is expected to total 161,000 tons, unshelled basis. This is 27,000 tons above 1960 production but nevertheless slightly below average.

U.S. production, which represents a small proportion of world production, is larger than in 1960 and 34 percent above average.

Foreign production is 26,000 tons greater than in 1960 but some 6,000 tons below average. Despite this increase in foreign production, export availabilities will be only slightly larger than in 1960-61 because supplies in Turkey, the main exporter, are not much larger than in 1960-61. Foreign filbert prices are higher than a year ago while domestic prices are down. It therefore appears that U.S. imports will not be heavy during 1961-62, possibly even less than the below-average imports of 1960-61.

Vegetables

Foreign trade in vegetables is relatively small in comparison with domestic trade, but it is of significance to growers in certain areas of the country. In calendar year 1960, exports continued the upward trend to all major destinations except Cuba. Fresh vegetables contributed 47 percent, canned 48 percent, and frozen 5 percent of the total value.

During the past decade, exports of fresh vegetables and melons increased at an average annual rate of 6 percent, and canned vegetables increased 10 percent yearly. Frozen vegetables expanded sharply, but the volume is still relatively small.

Export prospects for the 1961-62 season appear good. Exports to Canada should continue to increase, and there are likely to be larger shipments of both fresh and processed vegetables to

TABLE 15.--Vegetables: U.S. exports, by destination, average 1958-60

Commodity	Total	Canada	Cuba	Venezuela	Other
	Mil. lb.	*Percent of total*	*Percent of total*	*Percent of total*	*Percent of total*
Potatoes..............	302.2	71.1	13.9	6.6	8.4
Vegetables, fresh.....	749.8	86.1	6.6	.1	7.2
Vegetables, canned....	181.1	28.4	8.5	4.5	58.6
Total.............	1233.1	73.9	8.7	2.3	15.1

TABLE 16.--Vegetables, fresh: U.S. imports, by origin, average 1958-60

Commodity	Total	Canada	Chile	Cuba	Mexico	Other
	Mil. lb.	*Percent of total*	*Percent of total*	*Percent of total*	*Percent of total*	*Percent of total*
Potatoes....................	133.3	100.0	---	---	---	---
Tomatoes....................	279.9	.5	---	12.2	85.5	1.8
Melons......................	140.6	---	8.3	.3	86.4	5.0
Other.......................	303.9	41.4	5.9	16.6	24.2	11.9
Total, excl. potatoes.......	724.4	17.5	4.1	11.7	60.0	6.7
Grand Total.................	857.7	30.4	3.4	9.9	50.7	5.6

Western Europe. Shipments to Cuba are likely to be extremely low again this season, but canned and frozen vegetable exports to Canada and to Western Europe should expand moderately.

Despite a large U.S. potato crop and low prices, exports are expected to be down. Practically no potato exports will be made to Cuba, and trade with Canada may be low because of the restrictive actions taken by the Canadian Government. In the fall, all U.S. potatoes entering Western Canada were valued at $2.78 per hundredweight, f.o.b. U.S. shipping points. If they were sold at lower prices, the Canadian importer had to pay the difference to the Canadian government in addition to the duty of 37-1/2 cents per hundredweight.

Imports of fresh vegetables may be about the same as last year, but the volume is always dependent to a large extent on market prices in the United States. There will be a substantial reduction in vegetable acreage in Mexico and in most of the Caribbean area. However, last year there was a large amount of economic abandonment, especially on the West Coast of Mexico. Potato imports may continue to be down again this season because of abundant U.S. supplies and low prices.

The longterm outlook for both fresh and processed vegetable exports is good. The upward trend to Canada is expected to continue. Also, there may be substantial increases in exports of frozen and canned vegetables to Europe. In addition, there should be a rapidly expanding market for a few hardy winter and spring vegetables in Northern Europe. Exports to Latin America are largely dependent on economic development in this area. There will be continued pressure by increasing imports of winter vegetables from nearby Latin American countries and the Caribbean area.

DEVELOPMENTS IN THE WORLD MARKETS

The value of U.S. exports of fruits and vegetables has increased during the past decade and is expected to continue to increase this coming season. Improving demand conditions in Canada and in Western European markets have prompted this growth in trade.

Canada continues to be the most important single market for U.S. fruits and vegetables. The European market as a whole is almost as important as Canada in the case of fruit and nut products, while most vegetable exports go to Canada.

Almost all exports of U.S. horticultural products are sold commercially for dollars. During the last fiscal year, government-financed exports amounting to about $300,000 were made under Public Law 480 programs with Iceland and Yugoslavia. All of the items were fruit items, and the total value amounted to slightly over one-tenth of 1 percent of the total value of fruit exports.

TABLE 17.--Exports of horticultural products from the United States, by principal destination, 1956-1960

Calendar year	Canada	Europe		Central America	South America	Other	Total
		EEC	Other				
	Million dollars	*Million dollars*	*Million dollars*	*Million dollars*	*Million dollars*	*Million dollars*	*Million dollars*
Fruits and nuts and preparations:							
1956	101	66	61	15	9	14	266
1957	105	64	40	16	11	16	252
1958	112	62	49	15	13	16	267
1959	119	46	48	12	14	16	255
1960	117	54	58	7	13	21	270
Vegetables and preparations:							
1956	60	6	8	17	4	7	102
1957	59	6	5	19	4	8	101
1958	56	7	5	18	5	7	98
1959	59	6	5	15	4	7	96
1960	64	8	10	8	3	8	101

Removing Nontariff Barriers to Trade

In recent years, many of the import controls, or nontariff barriers, applied by major foreign market countries on imports of principal U.S. food commodities have been removed by the industrialized foreign countries as their financial conditions have improved.

The only liberalization moves in 1961 which were of major significance to U.S. horticultural exports were those on canned deciduous fruits in the United Kingdom and in West Germany mentioned earlier. These took place only after strenuous efforts on the part of U.S. exporters and foreign importers, coupled with government representations.

The task of removing nontariff barriers to trade in Western Europe has narrowed down to the most difficult ones -- the hard core. These barriers exist for imports of fresh apples and pears in all of the major European importing countries except the Netherlands. Each of the re-

maining countries restricts imports of fresh apples and pears during the Northern Hemisphere marketing season to protect local producing and trade interests.

The United Kingdom controls imports by means of Northern Hemisphere quotas, under which all Northern Hemisphere suppliers (and Argentina) may compete for business.

West Germany has established a series of import programs authorizing imports of fresh apples and pears from supplying countries. Most of these programs provide that embargoes may be placed on imports when German market prices fall below stated levels. Some of them permit the importation of only preferred varieties and grades when the German prices are low.

All of the rest of the European countries--except the Netherlands and Italy--prohibit the entry of fresh apples and pears until local supplies are largely used up. They then authorize their importation after "opening dates" are announced. This practice, of course, precludes any normal commercial arrangements from being established by U.S. exporters. Not only is it impossible to plan in advance for trade during a particular season, but also, European exporting areas, being closer to the markets, may readily take advantage of the opening dates, while North American exporters are disadvantaged because of the longer time of transit. Only Sweden, whose policies in announcing opening dates are more liberal than those of the other countries, has enabled continuing commercial arrangements to be established.

For years the U.S. Government has sought, without success, to persuade the Western European countries to liberalize imports of fresh apples and pears in accordance with their obligations under the General Agreement on Tariffs and Trade. Repeated representations had been made to each of the governments and also at the various sessions of the GATT. In the spring of 1961, special efforts were directed toward endeavoring to persuade West Germany, France, and Belgium to offer programs for the imports of U.S. fresh apples and pears on terms equal to or comparable with those offered various European sources of supply. Each of these countries had made arrangements either with their EEC partners or with other European suppliers for imports, while at the same time, their arrangements for imports of U.S. fruit were much less favorable. In other words, the United States requested these countries, as an interim measure pending removal of quantitative restrictions, to end their discrimination against fresh apples and pears from the United States. By November 1961, these governments had announced import programs, which, however, continued to discriminate against U.S. suppliers of fresh apples. Continued representations were being made to remove the discriminatory aspects of these programs. Late in November, the West German Government improved the terms of its import program for U.S. apples.

Another extremely difficult problem is presented by the quantitative restrictions imposed by the United Kingdom on imports--from the dollar area only--of fresh grapefruit during the winter season and of processed orange and grapefruit products. Imports of these fresh winter grapefruit are prohibited, and imports of processed oranges and grapefruit are sharply limited to maintain the British market for the British West Indies citrus industry. United States efforts to ameliorate this situation, although made at the highest political level of both governments, have thus far proved fruitless. Negotiations with the U.K. Government for the purpose of removing these limitations, which discriminate particularly against U.S. Gulf Coast suppliers, have been continuing for over 2 years. They had not been concluded as this was written.

The New European Tariffs

The growth of the European Economic Community, or the Common Market, will, of course, establish a new system of preferential arrangements for producers within the Common Market countries. The EEC member states already are in the transitional stage of reducing their tariffs for imports of commodities from within the Common Market and adjusting their tariffs for imports from outside countries toward the proposed Common External Tariffs. Tariff negotiations were initiated over a year ago, relating to the valuation of the Common External Tariff of the EEC, to be followed by a general round of exchange of tariff reductions by members of the GATT. Negotiations had not been concluded as this was written. It is likely, however, that the Common External Tariffs for horticultural items will not be significantly different from those proposed by the EEC countries. Regardless of the particular level of the Common External Tariff, fruit producers and processors in the EEC will have duty-free access to the markets, while outsiders

must encounter the duty at the end of the transitional period. This will provide tremendous new advantages to fruit producers in the EEC at the expense of imports from outside countries.

Exporters of horticultural items from the United States will be confronted in the near future with an extension of the EEC's preferential trading area to incorporate additional countries. If the applications of the United Kingdom, Denmark, and Ireland to join the Common Market are accepted, the export market for U.S. horticultural items will be materially affected.

The U.K. market, especially, is a large and traditional outlet for exports of U.S. horticultural products, particularly fresh and processed fruit items. Its duties are relatively low and for most horticultural items substantially lower than the proposed Common External Tariffs of the EEC. If the United Kingdom adopts the Common External Tariffs, its duties for imports of most fruit items will be increased sharply above their present levels.

The problem is complicated further by the preferential trading arrangements which currently exist between the United Kingdom and other areas in the British Commonwealth. If the United Kingdom is able to negotiate with the EEC countries the continuation of Commonwealth preferential arrangements in the U.K. market, U.S. exporters will face both increased duties and increased preferences in that market alone. If the United Kingdom succeeds in negotiating preferential arrangements for Commonwealth horticultural items in the entire EEC area, U.S. exporters will encounter even greater disadvantages. In any event, their competitive disadvantages in the U.K. market will increase as suppliers from the EEC and associated countries gain duty-free access to U.K. market.

The outcome of the current negotiations between the United Kingdom and the EEC will be watched carefully by the U.S. horticultural industries and the nature of the arrangements arrived at will materially affect U.S. exporting opportunities in the years ahead.

Special Problems

Not only the emergence of tariff preferences within the European Economic Community but also the growth of new nontariff barriers will affect exports of U.S. horticultural products to these markets.

The proposed agricultural policy for fruits and vegetables of the EEC Commission provides for regulating the quality of fruits and vegetables sold within the EEC in order to improve and maintain prices to producers. Standards are to be established for grades and packages, and only fruit and vegetables meeting minimum quality requirements are to be sold in commercial channels. Imports of these items from nonmember countries also will be subjected to minimum standards similar to those to be applied internally. The United States was represented at a meeting in October at which grade specifications for the first of the fruit and vegetable items to be developed were progressed.

The EEC policy proposals also provide plans to limit sales of horticultural products if prices become unduly low. And they assert the right to apply import restrictions where limitations are placed on sales within the community. This is another area that calls for vigilance, to make sure that import restrictions are not imposed except where community restrictions are truly carried out.

The increased emphasis on regulations governing the use of chemicals on fruits in the Common Market countries and in other European countries has led to several problems affecting exporters of U.S. fruits. European countries have recently stepped up their efforts to establish modern food health regulations either by establishing new codes or by renovating outmoded regulations governing the use of chemicals on foods. The United Nations Food and Agriculture Organization and the World Health Organization have been asked to devise jointly a uniform system of food health regulations which individual countries might use in the development of their own laws.

Thus far, most of the new regulations affecting internal fruit trade in Europe have been directed toward additives which are used on fruits to preserve their keeping quality in transit. Fruits that are shipped long distances require more treatment, and thus those exporting countries that are

distant from their importing markets tend to be affected to a greater degree than those that are close.

Not only have the regulations themselves limited the use of additives on fruits, but in some cases labeling requirements discourage the use of chemical additives.

A great deal of effort has been expended in an endeavor to provide foreign governments and scientists with information developed and used in the United States in arriving at the tolerances that have been established to govern the use of chemicals in this country. The Agricultural Research Service has been cooperating with the Foreign Agricultural Service in activities designed to provide information and guidance to foreign countries in the development of their regulations governing the use of chemicals on imports of horticultural items.

Promotional Activities

The export market for most U.S. fruit items is a traditional one. Individual exporters have had long experience in developing and maintaining foreign outlets. Numerous individual promotional and merchandising activities are carried out by firms or organizations through their agents or representatives abroad.

TABLE 18.--Planned expenditures under fruit and vegetable market development projects

Fiscal year	Funds from sales for foreign currencies[1]	Funds from industry cooperators	Total
	Equiv. $1,000	*Equiv. $1,000*	*Equiv. 1,000*
1957.............	84	41	125
1958.............	170	101	271
1959.............	14	18	32
1960.............	138	169	307
1961.............	433	461	894

[1]Under Sec. 104(a) of P. L. 480.

As restrictions on trade gradually have been removed, increasing emphasis is being placed by U.S. exporting firms or industry organizations on promoting their products in foreign markets. To supplement these industry activities, there have been increased promotional activities by the Foreign Agricultural Service with foreign currencies generated by sales under Public Law 480. During fiscal 1961, there were 8 projects of this nature for horticultural products.

During this past season, market development projects which have been carried on for several years for three fruit items--prunes, raisins, and fresh and processed Florida citrus fruit--were placed on a continuing basis. This will enable these industries to plan ahead more effectively in their foreign promotional activities, and also to more effectively coordinate commercial operations with merchandising and promotional efforts.

Developmental projects have been initiated for fresh and processed cranberries and for processed red tart cherries. Foreign sales of these products have been extremely small in the past. The continuation or expansion of these projects will depend largely on the results obtained from the present activities.

The Agricultural Marketing Service, in cooperation with the Foreign Agricultural Service, carried out an intensive inspection of the quality and condition of U.S. fresh and processed fruit items

Florida grapefruit sections, above, attract shoppers in a Copenhagen department store during the Small Food Exhibit in Denmark last October.

Interested Germans inspect American horticultural display at 1961 Hamburg Trade Fair. This was the first U.S. solo fair, displaying nothing but agricultural products.

on the British market in comparison with similar items imported from competing foreign suppliers. The results of these surveys will be published shortly.

Activities in cooperation with the University of Florida and the Florida vegetable industry resulted in the shipment of some winter vegetables to Northern European markets, especially the United Kingdom. These trials indicated that market opportunities, especially for shipments of fresh celery, can be further developed in Northern European markets during the winter shipping season.

Projects for the promotion of California-Arizona fresh citrus fruits and for the preparation of an export manual for fresh apples are expected to get underway shortly.

United States fruit and vegetable products were shown and demonstrated at the following trade fairs: Paris, in May; Stockholm, in September; Copenhagen, in October; and Hamburg, in November. In addition, many U.S. fruit exporters participated in the September showing at the trade center opened in London by the Departments of Commerce and Agriculture.

COMPETITION STUDIES

Competition studies which have been published in 1961 are listed below:

The Raisin Industry of Iran. FAS-M-114, April 1961. A 37-page report describing the Iranian industry and appraising its potential.

Citrus Industry of Spain. FAR-56, Revised, July 1961. A 54-page report covering changes in the industry since 1948 and evaluating Spain's present and future as a competitor.

The Deciduous Fruit Canning Industry of Spain. FAS-M-119, August 1961. A 21-page report describing this expanding Spanish industry and assessing its potential.

The Olive Industry of Mexico. FAR-85, Revised, November 1961. A 28-page report bringing up to date the 1955 report on Mexican production and utilization of olives.

Mexican Strawberry Industry Expanding. FDAP 1-61, May 1961. A 6-page report on this Mexican industry, which has been providing increasing import competition in the United States.

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